

**State of Michigan
Civil Service Commission**

Capitol Commons Center, P.O. Box 30002
Lansing, MI 48909

Position Code

1. DEPSPL2

POSITION DESCRIPTION

This position description serves as the official classification document of record for this position. Please complete the information as accurately as you can as the position description is used to determine the proper classification of the position.

2. Employee's Name (Last, First, M.I.) 	8. Department/Agency TECH, MGMT AND BUDGET - MB
3. Employee Identification Number 	9. Bureau (Institution, Board, or Commission) Office of Support Services
4. Civil Service Position Code Description Departmental Specialist-2	10. Division Logistics and Operations Support
5. Working Title (What the agency calls the position) Departmental Specialist 13	11. Section Records Management Services (RMS)
6. Name and Position Code Description of Direct Supervisor SAMPLE, BRICE; STATE ADMINISTRATIVE MANAGER-1	12. Unit
7. Name and Position Code Description of Second Level Supervisor WRIGHT, SETH T; STATE DIVISION ADMINISTRATOR	13. Work Location (City and Address)/Hours of Work 3400 N. Grand River, Lansing, MI / Monday - Friday; 7:30 am to 4:00 pm

14. General Summary of Function/Purpose of Position

This position serves as the Records Management Specialist with advanced expertise in retention, compliance, and governance within the M365 environment. The specialist provides direction in developing, implementing, and maintaining statewide records management procedures and information lifecycle standards specific to M365 environment. The role functions as the State of Michigan's primary M365 records governance authority, exercising substantial independent judgment to interpret complex legal, regulatory, and policy requirements, resolve intricate retention and disposition issues, and lead agencies in implementing statewide governance expectations.

The position directs statewide compliance reviews, training initiatives, and retention schedule reviews to ensure consistent compliance with statutory mandates. It leads cross-agency coordination with applicable DTMB support areas, the Archives of Michigan, the Office of the Auditor General, and the Department of Attorney General, serving as the central expert for governance, retention, and lifecycle management for M365. The specialist conducts research and analysis, designs statewide M365 use models, and develops policy and governance recommendations that strengthen compliance, improve operational efficiency, and support uniform digital recordkeeping practices across the SOM.

Additionally, the specialist leads statewide documentation governance by creating standards, guiding development and finalization of official materials, administering documentation systems, and preparing high-level communications. Work is performed with significant independence and requires expert-level knowledge of statewide records management operations, compliance requirements, and M365 platform governance, with responsibility for shaping statewide standards and ensuring uniform implementation across all SOM agencies.

15. Please describe the assigned duties, percent of time spent performing each duty, and what is done to complete each duty.

List the duties from most important to least important. The total percentage of all duties performed must equal 100 percent.

Duty 1

General Summary:

Percentage: 60

Serve as the authority for M365 records management governance for the State of Michigan, providing enterprise-level leadership in the implementation of retention schedules, lifecycle standards, and recordkeeping procedures. Interpret complex legal and policy requirements, resolve high-risk retention and disposition issues; and direct agencies in applying governance standards.

Individual tasks related to the duty:

- Serve as the statewide subject matter expert for M365 records retention schedule compliance, and disposal in accordance with DTMB RMS guidance, statewide IT policies, relevant Ad Guide policies, the State Records Management Manual, and statutory requirements.
- Act as the primary liaison between Records Management Officers (RMOs) and DTMB RMS, providing authoritative interpretation of IT policies related to lifecycle management, and statewide governance requirements.
- Lead statewide review, update, and coordination of all M365-related retention schedules to ensure accuracy, legal compliance, and alignment with statewide standards.
- Analyze statewide M365 recordkeeping workflows, conduct enterprise research, and develop recommendations to improve compliance, efficiency, and governance practices.
- Provide expert-level consultation during development and review of M365 file plans and libraries, ensuring integration of retention, governance, and compliance requirements.

Duty 2

General Summary:

Percentage: 20

Lead the statewide development, alignment, and maintenance of M365 governance structures for Records Management and information lifecycle control. Develop and maintain enterprise policies, standards, procedures, and guidance to support uniform governance practices across all SOM agencies. Conduct statewide evaluation of recordkeeping requirements, identify emerging compliance and security challenges, and recommend statewide governance strategies to strengthen retention, security alignment, and lifecycle management. Direct statewide implementation and oversight of Records Management related Purview tools—including but not limited to retention labels, sensitivity labels, Data Loss Prevention, and information governance configurations—to ensure consistent adoption. Monitor statewide compliance with M365 retention schedules and governance requirements, identify compliance gaps, and develop corrective actions in collaboration with the owing agencies. Provide authoritative governance guidance to agencies and ensure statewide consistency in M365 governance practices.

Individual tasks related to the duty:

- Collaborate with and coordinate various M365 technology owners (messaging team, SharePoint team etc.) to identify key control elements of the environment to determine configuration settings that will help ensure statewide consistency with retention practices
- Develop, update, and maintain statewide governance documentation for M365, including policies, standards, procedures, and guidance materials.
- Evaluate enterprise recordkeeping and compliance needs across agencies; identify statewide governance challenges and develop strategic improvements.
- Recommend and support implementation of statewide governance strategies that enhance retention, security alignment, and information lifecycle management.
- Oversee statewide implementation, configuration, and usage of M365 Purview tools—retention labels, sensitivity labels, DLP, and governance configurations—to ensure consistent adoption and compliance.
- Draft and publish guidance and best practices that support the implementation of retention in M365.
- Draft and submit statewide standards, that support the implementation of retention and M365 governance for approval by various state governing authorities.
- Consult with other subject matter experts regarding information governance including but not limited to agency Security Officers, Records Management Officers, Litigation Liaisons, SharePoint Administrators, and FOIA Officers to facilitate input of all aspects of information governance.

Duty 3

General Summary:

Percentage: 10

Develop and deliver statewide training, related to M365 based on enterprise policies, standards, procedures, and guidance to support uniform governance practices across all SOM agencies. Solicit feedback from trainees to improve training and to support continued process improvement for established enterprise policies, standards, procedures and guidance.

Individual tasks related to the duty:

- Deliver statewide training for RMOs and agency staff on M365 retention, disposition, governance expectations, and compliance responsibilities.
- Represent DTMB at statewide meetings, committees, and cross-agency workgroups related to retention schedules, governance alignment, and records management policy.
- Distribute statewide M365 governance updates, standards, communications, and training opportunities; ensure employees across agencies have access to required M365 records management resources.
- Coordinate statewide compliance reviews of Records Center users and M365 access permissions to ensure compliance, accountability, and secure record handling.
- Develop recommended standard operation procedures for the review of document destruction and archives transfer notices for records in the M365 environment.
- Initiate and manage creation, revision, and lifecycle maintenance of statewide M365 retention schedules in collaboration with DTMB RMS.

Duty 4

General Summary:

Percentage: 10

Other duties as assigned.

Individual tasks related to the duty:

- Conduct additional enterprise research and analysis in support of statewide records management initiatives.
- Perform cross-agency coordination and policy development work requiring advanced specialist-level expertise.
- Lead or support special projects involving statewide information governance, compliance, or M365 platform enhancements.
- Provide expert consultation for emerging statewide issues related to records management, M365 governance, or digital lifecycle requirements.

16. Describe the types of decisions made independently in this position and tell who or what is affected by those decisions.

This position independently interprets and applies statewide M365 retention, compliance, and governance requirements to resolve complex enterprise records management issues. It makes expert, high-impact decisions regarding retention schedules, disposition, storage methods, and M365 configurations, ensuring statewide legal, regulatory, and security compliance. The specialist independently evaluates statewide workflows, identifies compliance risks, and determines corrective actions or improvements needed to strengthen statewide digital recordkeeping.

These decisions affect all SOM agencies and carry significant statewide implications; incorrect determinations could result in audit findings, legal exposure, data loss, or compromised accountability. The position also independently identifies emerging areas in M365 requiring additional research and develops statewide best practice, policy, and procedural recommendations.

17. Describe the types of decisions that require the supervisor's review.

Supervisor review is required for decisions involving fiscal commitments, including acquisition of technology, storage, or infrastructure supporting statewide M365 records management. Supervisor review is also needed before final approval of formal statewide policy, procedure, or best-practice documentation to ensure alignment with department priorities and statewide governance direction. Enterprise issues with substantial cross-agency impact or changes representing significant shifts in statewide governance strategy require supervisory consultation. Routine specialist-level determinations are made independently.

18. What kind of physical effort is used to perform this job? What environmental conditions in this position physically exposed to on the job? Indicate the amount of time and intensity of each activity and condition. Refer to instructions.

Typical office environment. Occasional travel to other buildings.

19. List the names and position code descriptions of each classified employee whom this position immediately supervises or oversees on a full-time, on-going basis.

Additional Subordinates

20. This position's responsibilities for the above-listed employees includes the following (check as many as apply):

- | | |
|---|--|
| ☐ Complete and sign service ratings. | ☐ Assign work. |
| ☐ Provide formal written counseling. | ☐ Approve work. |
| ☐ Approve leave requests. | ☐ Review work. |
| ☐ Approve time and attendance. | ☐ Provide guidance on work methods. |
| ☐ Orally reprimand. | ☐ Train employees in the work. |

22. Do you agree with the responses for items 1 through 20? If not, which items do you disagree with and why?

Yes

23. What are the essential functions of this position?

This position serves as the Records Management Specialist with advanced expertise in retention, compliance, and governance within the M365 environment. The specialist provides direction in developing, implementing, and maintaining statewide records management procedures and information lifecycle standards specific to M365 environment. The role functions as the State of Michigan's primary M365 records governance authority, exercising substantial independent judgment to interpret complex legal, regulatory, and policy requirements, resolve intricate retention and disposition issues, and lead agencies in implementing statewide governance expectations.

The position directs statewide compliance reviews, training initiatives, and retention schedule reviews to ensure consistent compliance with statutory mandates. It leads cross-agency coordination with applicable DTMB support areas, the Archives of Michigan, the Office of the Auditor General, and the Department of Attorney General, serving as the central expert for governance, retention, and lifecycle management for M365. The specialist conducts research and analysis, designs statewide M365 use models, and develops policy and governance recommendations that strengthen compliance, improve operational efficiency, and support uniform digital recordkeeping practices across the SOM.

Additionally, the specialist leads statewide documentation governance by creating standards, guiding development and finalization of official materials, administering documentation systems, and preparing high-level communications. Work is performed with significant independence and requires expert-level knowledge of statewide records management operations, compliance requirements, and M365 platform governance, with responsibility for shaping statewide standards and ensuring uniform implementation across all SOM agencies.

24. Indicate specifically how the position's duties and responsibilities have changed since the position was last reviewed.

25. What is the function of the work area and how does this position fit into that function?

The work area serves state and local government agencies in improving their records management practices including ~~records retention compliance and using technology to better manage records~~

26. What are the minimum education and experience qualifications needed to perform the essential functions of this position.

EDUCATION:

Possession of a bachelor's degree in any major.

EXPERIENCE:

Departmental Specialist 13 - 15

Four years of professional experience, including two years equivalent to the experienced (P11) level or one year equivalent to the advanced (12) level.

KNOWLEDGE, SKILLS, AND ABILITIES:

Knowledge:

- Advanced knowledge of records and information management (RIM) principles, including statewide retention, disposition, compliance, and lifecycle management requirements.
- Extensive understanding of M365 platform governance, including Purview retention labels, sensitivity labels, data loss prevention (DLP), and information governance configurations.
- Knowledge of enterprise information security concepts and how retention, governance, and compliance requirements integrate with system security planning.
- Expertise in analyzing complex business processes and designing statewide records governance structures that improve efficiency, consistency, and compliance.
- Strong knowledge of RIM industry standards, emerging technologies, and professional best practices applicable to modern digital records environments.

Skills:

- Exceptional analytical and problem-solving skills, with the ability to evaluate statewide workflows, identify compliance gaps, and develop enterprise corrective actions.
- Skilled in drafting, interpreting, and applying statewide policies, standards, procedures, and guidance related to M365 governance and records management.
- Strong communication skills (verbal, written, and interpersonal), capable of conveying complex retention, compliance, and security requirements to agency leadership and technical staff across SOM.
- Ability to conduct advanced research on M365 tools, governance models, and emerging RIM technologies, and translate findings into statewide policy recommendations.
- Skilled in designing and delivering statewide training, guidance, and educational materials for Records Management Liaisons and agency personnel.

Ability to:

- Exercise substantial independent judgment to interpret complex legal, regulatory, and governance requirements and apply them in high-impact situations.
- Lead and coordinate enterprise governance efforts across multiple agencies, ensuring alignment, consistency, and compliance with statewide standards
- Develop and implement statewide strategies that enhance digital recordkeeping, improve information lifecycle management, and strengthen compliance.
- Engage effectively with statewide partners — including Archives of Michigan, Auditor General, Attorney General, and DTMB business areas — to resolve complex issues and maintain governance alignment.
- Evaluate and recommend M365 platform configurations and governance tools to support statewide retention, security, and compliance requirements.
- Collect, analyze, and synthesize data to inform enterprise decision-making and governance enhancements.

CERTIFICATES, LICENSES, REGISTRATIONS:

- CRM or other information governance certification preferred.
- This position is required to submit fingerprints for multiple state and federal criminal background record checks. The candidate must currently be felony-free and must remain so in the future. Any position offer will be conditional until results of the criminal background record checks indicate eligibility for employment. The candidate selected for this position may be required to submit financial information for a financial background check.

NOTE: Civil Service approval does not constitute agreement with or acceptance of the desired qualifications of this position.

I certify that the information presented in this position description provides a complete and accurate depiction of the duties and responsibilities assigned to this position.

Supervisor

Date

TO BE FILLED OUT BY APPOINTING AUTHORITY

Indicate any exceptions or additions to the statements of employee or supervisors.

N/A

I certify that the entries on these pages are accurate and complete.

STACI ERICKSON

Appointing Authority

9/22/2026

Date

I certify that the information presented in this position description provides a complete and accurate depiction of the duties and responsibilities assigned to this position.

Employee

Date